



TRILLIUM

## **Maximizing Your CSAE Trillium Business Membership**

### **Background**

At the Business Member Forum held at the 2016 Winter Summit participants discussed various challenges and offered suggestions as to how CSAE Trillium can help them maximize CSAE membership benefits. An outcome of this endeavor is the development of this information resource to assist new Business members seeking to better understand and engage with Executive members and enhance relationships to mutually benefit both parties. We are happy to provide the following information, which we hope will be helpful to business members in making the most of their CSAE membership.

### **About CSAE**

Considered by many as Canada's "association of associations," the **Canadian Society of Association Executives** (CSAE) is the professional organization of the men and women who manage many of this country's most progressive associations, as well as those who supply the sector with essential products and services. The Trillium Network is the largest Network of CSAE with just over 1,340 members and covers the geography of all of Ontario outside of the Ottawa region. There is a separate Network in Ottawa.

Members fall into one of two categories. **Executive Members** manage Canada's leading trade, professional, occupational, philanthropic, and single or common interest organizations. **Business Members** are individuals representing organizations that offer services and products to the association community.

**CSAE Trillium** is CSAE's largest Network, with just over 1,340 members (80% association executives, 20% business members). Much like the national organization, CSAE Trillium includes leaders from a variety of associations, as well as business leaders from a variety of organizations serving the association market. The Trillium Network is considered the voice for CSAE members in this region.

CSAE members can choose which Network they want to belong to, but generally members belong to the Network based on their geography.

### **Managing Expectations**

It's important for business members (and their employers) to manage their expectations by understanding from the outset that CSAE Trillium does not:

1. Provide leads to business members.
2. Sell its membership list (CSAE Trillium member details are accessible via the members-only section of the CSAE website, [www.csae.com](http://www.csae.com)).
3. Act as a referral service.

### **Association Executives – Who are they? What are they like? How do I sell to them?**

Association executives wear many hats depending on the size of the association. A title is not as indicative of role as it would be in the corporate world. Depending on the size of the association, the Executive members you will meet may be the key contact or may lead/refer you to the key contacts in their organization who have interest in your products and services.

### **Closing the Contract**

How you close the business is up to you however, you will be more successful if you follow this mantra:

#### **Know, like and trust**

Get to **know** the prospect. Allow them the opportunity to **like** you. Once they **trust** you they are more likely to do business with you. This often takes a little bit of time but is well worth the effort. Phone calls post event are perhaps more successful than an email broadcast to the whole attendee group or an aggressive selling technique at the event.

Business members who have been the most successful would agree that the simple formula of Know, Like & Trust is at the heart of all their client interactions. We think this is especially true of your potential clients in CSAE Trillium. You need to be patient. Relationships don't happen overnight.

### **3 Opportunities to Connect with Executive Members (volunteer, communicate, network, sponsor)**

#### **How Members Connect, Learn & Share - Volunteer**

Successful Business members active in the network will tell you that one of the best ways to make the most of your business membership is to get involved in the network by volunteering on a network committee. Contact CSAE Trillium office to enquire about volunteering. [admin@csae-trillium.com](mailto:admin@csae-trillium.com)

#### **How Members Connect, Learn & Share – Communication Vehicles**

##### **Network Newsletter**

Read CSAE Trillium's newsletter to keep up on what's happening in the network and with the not for profit sector. Each issue has a number of articles geared toward assisting association executives excel at their jobs. The CSAE Trillium newsletter comes out quarterly with a re-fresh each month.

**Twitter** - You can **#getsocial** with us on Twitter by following **@CSAETrillium**. We'll be posting CSAE Trillium announcements as well as sharing **#nonprofit** and **#assn** articles and content. Make sure to follow us to stay in the know!

**LinkedIn** - You can **#getsocial** with us on LinkedIn by joining CSAE Trillium LinkedIn discussion group and by following our company page. The company page is newly added to our social media toolbox, simply search for CSAE Trillium Network and then follow the page to see all of the updates that we post!

**E-blasts** – Generally CSAE Trillium sends out a weekly email to its members. This email has information on event registration, upcoming events etc.

### **How Members Connect, Learn & Share – CSAE Trillium Events**

Professional development and networking are two of the cornerstones of CSAE Trillium. Trillium members can connect at a variety of events, such as educational seminars, conferences and social gatherings - an attendee list is generally available at each event. The following is a brief description of Trillium Network events:

#### **Professional Development Exchange Events (PDX) – 4 to 6 times per year**

The Professional Development Exchange (PDX) is primarily focused on education and learning. Offered four to six times a year, PDX sessions are held at different venues so as to showcase business members' products and services. Sessions typically start in the morning and run two to three hours, but occasionally there may be a full day PDX workshop. PDX events typically draw between 45 and 100 attendees

#### **Winter Summit – late January/early February**

#### **Summer Summit – July**

These two conferences provide our business members with very important one-on-one face time with association executives. The ratio of business member to association executive is kept at 1:1. Attendance at the summits has grown every year with association executive attendees greater in number than business members. Generally, you can expect 150-170 association executives at each conference.

The audience at each summit is jam-packed with association decision-makers, such as Presidents and CEOs, Executive Directors, Events & Special Projects Coordinators, Conference Planners, and Senior Directors of Finance, HR etc. so there are plenty of opportunities for business members to introduce themselves to these potential customers.

Each summit is held on a Wednesday - Friday. There are professional development workshops on Thursday and Friday with a welcome reception on the Wednesday. On Thursday evening there is a networking reception that is second to none and is always fun, upbeat and, most importantly, productive for both our business and association executive members.

#### **Volunteer Appreciation Luncheon – April**

Each year, a Volunteer Appreciation Luncheon is held to celebrate and recognize CSAE Trillium Network volunteers. This is a great opportunity to appreciate camaraderie among fellow volunteer Business and Executive members.

#### **Annual Awards Dinner – late September/early October**

Each year, CSAE Trillium celebrates the contributions of outstanding Business and Executive members at its Annual Awards Dinner, which is held in the autumn. This event, which draws approximately 230 members, not only celebrates volunteerism within the association community

and recognizes the contributions made by the award winners, but also provides another excellent opportunity for business members to network with each other and with associations executives.

Prior to this gala dinner, CSAE Trillium holds its Annual General update where members are updated on CSAE Trillium's finances, vote for new directors and learn about the strategic direction and accomplishments of the past year.

### **Annual Holiday Season Reception and Dinner – early December**

Every December CSAE Trillium hosts a Holiday Season Reception and Dinner that brings members together (attendance is generally 350-400) to connect in an informal and festive setting and to raise funds for the network's charity of choice for that year. The evening kicks off with a cocktail reception followed by a three-course dinner. Networking opportunities abound.

### **How Members Connect, Learn & Share - Sponsorship**

In addition to the events described above, CSAE Trillium offers business members opportunities to raise their profiles, increase brand awareness, and showcase their products and services through five levels of sponsorship available at events and educational sessions, and advertisements in the network's newsletter by these business development opportunities for business members.

### **To Sum It Up – Get Involved!**

Whether you participate in CSAE Trillium events or volunteer on a committee, there are many opportunities for you to build/strengthen relationships with both Business and Executive members.

Successful Business members active in CSAE Trillium will tell you that one of the best ways to make the most of your business membership is to get involved in the network. This group is warm and welcoming and given time you will make many friends. Like any social environment you might feel awkward at first. But give it a bit of time and you will quickly become an engaged member of the community and best of all you are sure to make many friends.

The more you put into CSAE Trillium, the more you will get out of your membership. As you become better known in CSAE Trillium, your network will grow. Get involved.....and get results.

Check out this video on getting involved

[http://www.csae.com/Portals/0/media/CSAE%20Membership%20Video%202014\\_converted\(1\).mp4](http://www.csae.com/Portals/0/media/CSAE%20Membership%20Video%202014_converted(1).mp4)

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